

APPENDIX G

Supplemental Security Income/Social Security Disability Insurance (SSI/SSDI) Outreach, Access, and Recovery (SOAR)

SOAR is a national project funded by the Substance Abuse and Mental Health Services Administration (SAMHSA) that is designed to increase access to SSI/SSDI for eligible adults with mental illnesses or co-occurring disorders who are homeless or at risk of homelessness. Access to SSI/SSDI is a major tool in recovery from mental illnesses, homelessness or co-occurring disorders to engage in treatment, to keep appointments, to maintain housing, and to meet other basic needs.

I. Network Provider Responsibilities

1. Designation of a SOAR Processor: The Network Provider shall have a designated Case Manager/SOAR Processors trained in the SOAR Process who will process SOAR applications for all consumers receiving case management services under this contract that have been screened and determined to be eligible for SOAR benefits. The Case Manager(s)/SOAR Processor(s) is responsible for their own training in the SOAR Model through the SOAR Online Course developed by Policy Research Associates and SAMHSA available at: <https://soarworks.prainc.com/course/ssissdi-outreach-access-and-recovery-soar-online-training>.
2. Each Case Manager/SOAR Processor at the Network Provider is responsible for entering their information and data into the SOAR Online Application Tracking (OAT) system. The Network Provider is responsible for notifying the ME about information regarding their Case Manager/SOAR Processor. This includes their name, SOAR Training Completion status, and their registration in OAT.
3. Eligibility Screening: Screening for SOAR eligibility shall be conducted during the intake or admissions process.
4. Timeframes for Completion of Applications: SOAR applications must be completed within a maximum of sixty (60) days of the protective filing date. This may vary depending on the Social Security Administration (SSA) office and the SOAR Liaison at that office. The SOAR Processor is responsible for going to their local SSA office and forming an agreement between themselves and the SSA SOAR Liaison about specific timeframes and what form of communication is best.
5. Appeals: If applicable the SOAR Processor shall complete the appeal process for those applications which may be denied upon initial review;
6. Data Requirement (OAT System): The SOAR Processor shall start entering information into the OAT system once the protective filing date is determined. They should not wait for the application decision to be made before they enter data into the OAT system. The SOAR Processor(s) shall input all of the data into the OAT System, at a minimum monthly, for processed applications during the reporting period. The SOAR Processor(s) shall be responsible for ensuring that the information in the OAT System is updated regularly as necessary. The OAT program is available at: <https://soartrack.prainc.com/login.php>

7. Training: New SOAR Processor(s) shall be trained within forty-five (45) days of hire. The SOAR Processor(s) is responsible for their own training in the SOAR Model through the SOAR Online Course developed by Policy Research Associates and SAMHSA available at:
<https://soarworks.prainc.com/course/ssissdi-outreach-access-and-recovery-soar-online-training>
8. The Network Provider is responsible for notifying the ME regarding the training status of their Case Manager/SOAR Processor. The Case Manager/SOAR Processor shall complete the SOAR Online Course even if they participated in an in-person SOAR Training in the past.
9. The SOAR Processor(s) shall attend the regularly scheduled or specially called meetings when notified by the ME. These include SOAR group technical assistance trainings SOAR fundamental refresher trainings.
10. Performance Outcomes & Outputs: The Network Provider shall meet the standards and required outcomes specified below:
 - a. Maintain a minimum completion rate of 75% of applications are completed and submitted within 60 days of the initiation of case management services.
 - b. At a minimum, the Network Provider shall have a sixty-five percent (65%) SOAR application approval rating during each fiscal year.
 - c. Maintain the minimum negotiated quarterly target of «**TBD**» for completed applications.

Network Provider Compliance: Failure to meet the applicable standards established in Tables 1 and 2 shall be considered nonperformance pursuant to **Standard Contract, Paragraph 36. Financial Consequences for Network Provider's Failure to Perform.**

II. Managing Entity Responsibilities

1. The ME shall adhere to the requirements identified in the Department's Supplemental Security Income/Social Security Disability Insurance (SSI/SSDI) Outreach, Access, and Recovery (SOAR) Guidance Document – Incorporated Document 9.

The Department's Incorporated Document 9 can be accessed by visiting the Department's website or by clicking on the link below:

<http://www.myflfamilies.com/service-programs/substance-abuse/managing-entities/2017-contract-docs>

2. The ME shall ensure that the Network Provider implements the SOAR process.
3. The ME shall monitor the Network Provider's performance on all tasks identified in this Exhibit and issue corrective actions if deemed necessary.
4. The ME shall provide training and technical assistance when requested by the Network Provider.